Winter Checklist - OCTBR

This checklist is based on the OCTBR (Online Course Teaching and Building Rubric). The purpose is to help faculty build a thorough program of courses, or an advanced, larger course over many weeks or months.

It is <u>not</u> prescriptive – some scenarios or aspects won't suit your class or program – but a tool to help create courses with best practices.

Users may use this checklist to consider and add many perspectives and best practices for online learning, several months before launching a course or cluster of courses.

Course Overview

Introduction to Instructor and Program
❏ My site lists my email and office telephone and best times to be reached.
❏ I've linked a picture of myself, and a short biography or link to my research interests or major projects.
❏ I have listed specific times & locations through semester for both my online and face-to-face office hours.
❏ I have a list of email addresses and office telephone numbers for program and/or department, and links to my program and department.
❏ I confirm what the expected turnaround time will be for email replies, such as "within 48 to 72 hours, Monday through Friday".
❏ I can also offer a link to my distance learning (DL) students, to an online learning readiness assessment (example: the [Penn State](#) or [Stanislaus State](#) assessments), so learners can self-assess their abilities, attitudes and preparedness for online courses.
❏ For students in my distance learning or hybrid courses, I've arranged for an introductory and welcome session over videoconferencing (such as Google Hangout, Skype etc).

Course Introduction
❏ I created a brief welcome video for the course.
❏ I have an overview of my course, explaining the course's purpose and objectives in detail, to help provide context to existing educational programs and future professional practice. I can include a program map to help situate this course in the sequence of learning my students will be taking.
❏ I can explain the course's format (online, hybrid, PBL, etc) briefly.
❏ I can also have a quick summary of any prerequisites or other requirements.
❏ Rules of conduct and netiquette are defined for learners.
❏ There's a clear site "entrance" with an introduction to the course, on the main landing page or as a top-level folder ("Start Here: Introduction"), allowing my students to quickly and repeatedly find time-sensitive, organized materials.
❏ I have stated the expected turnaround for feedback on assignments.

Course Introduction [continued]

- ❏ My syllabus is provided in Word and PDF format (using the official school or department template if required); it includes my contact information and office hours, a summary of course goals and objectives, expectations for student work, a calendar with due dates for assignments, and a detailed breakdown of assignments.
- ❏ I will link any policies on late work.
- ❏ Optional materials that can assist in learning the course are available, and clearly marked as "further enrichment" rather than "required" materials.

Course Organization & Navigation

- ❏ My content is structured in course folders, which are based either on topics, weeks of instruction, or a similar structure. They are easily navigated, and intuitive. The course navigation structure is consistent, using both text and icon information.
- ❏ Navigation is chunked into high level sections based on sequence of instruction: there are no unnecessary clicks for learners to access a new topic. (For instance, students do not have to first click "Content" before they can access "The Circulatory System" section.)
- ❏ For usability and quick access, I also avoid nesting material more than two levels from the top menu, or top-most course level.
- ❏ Navigation text labels are descriptive yet concise. ("The Circulatory System" is better, both descriptive and concise, than "Week 2" (not descriptive, but concise) or "A Thorough Introduction to the Circulatory System and the Wonders Therein" [descriptive, but not concise])
- ❏ All content and a full course organization is available when the course opens to students.
- ❏ Tools or links I won't be using in the course have been removed from the menu.
- ❏ Students can also explore through navigation out of order, where it does not impact learning negatively. Time-gated information serves a specific purpose (such as a high stakes test that cannot be taken too early in the semester).
- ❏ An assignment or assessment (such as a scavenger hunt or quiz) can give students the opportunity to navigate around the course; it also allows for technical issues to be noted early in the semester, prior to high-stakes assessments.
- ❏ Review folders or similar summary materials are available for each section.

Accessibility Information

- ❏ For students who have accessibility concerns, I have linked to my school's Disabilities page, and include text that explains how to request accommodation through the campus ADA officer.
- ❏ I can also link to FAQs about ADA and disability services for learners.
- ❏ To help students with visual impairments, I have alternative or "alt" text for graphics.
- ❏ Titles for my pages, links, and content are short and descriptive.
- ❏ Since color-blindness is common (4-8% among different populations) I don't use color alone to convey information – for instance, instead of having crucial words highlighted in red only, I use red text with underlining.
- ❏ My entire course design uses high contrast colors, using a palette that make my course easier to use for learners with visual disabilities (including color-blind users). I tested my palette with the WebAIM Color Contrast Checker.

Accessibility Information (continued)

- ❏ If I have text that students must read at length on-line, it is in a sans-serif font like Tahoma, Futura, or Verdana.
- ❏ Transcripts or captions are provided for audio or videos linked into the course
- ❏ No multimedia or element in the course requires mouse interaction; for instance, a key can be pressed OR the mouse used to interact with embedded multimedia.
- ❏ I also, when creating a form in my course, use labels ("First name") rather than placeholder text ("What is your first name?"), and they can be completed using tab keys.
- ❏ Wherever possible, I mention that content will open in a new window or tab.
- ❏ I'm avoiding flickering, blinding, scrolling and auto-updating items on my course, including embedded items and videos.
- ❏ My Word documents are designed with styles (such as headings and subheadings), and alternative text, and I use Word's built-in accessibility checker.
- ❏ My PowerPoint documents avoid vertically merged cells, placeholders and text boxes that cause issues for screen readers.
- ❏ I can add PowerPoint documents to Slideshare, which generates transcriptions and can be quickly embedded into Blackboard or other learning managements systems.

Accessibility for Advanced HTML users

- ❏ If I'm an advanced user who builds much of my course in HTML and related markup languages, I still follow accessibility guidelines.
- ❏ CSS style sheets are available to broaden font variations and colors, but not to designate structural elements like headings, paragraphs, and lists, which are created in HTML or the course management system's content editor. No information is conveyed with CSS formatting only.
- ❏ Image maps used for the site are client-side; and offer alt-text for areas and the map.
- ❏ Forms are developed (Ex. HTML, Bb, SoftChalk) with prompting text next to controls, and input elements (e.g. checkboxes).
- ❏ No "hover" states are used to trigger actions, instead I use tangible items or secondary menu selections.

Instructional Design

- ❏ My course's learning activities, practice and assessments are consistent with any student outcomes or objectives (SLOs) in my course, and have a basic structure from one content folder to another that's easy for students to follow. I state how assignments, practice, and activities connect to student learning outcomes, so my students better understand why, not only what, they're learning.
- ❏ I make standards and requirements for succeeding in assignments, including technical needs, available where students are submitting their work or taking assessments, as well as in the syllabus. That way, my students have lead time to download software, and definitions for their success that is available ahead of time.
- ❏ Learning materials or assessments in different formats exist throughout the major sections of my course, to accommodate diverse learning preferences. For instance, I have short audio microlectures, created in MP3 format, that students can download to their cell phones and listen to during breaks; or I created a diagram where students must fill in the "legend" or blank spaces, explaining parts of the graphic; or I share both a journal article and a short video explaining aspects of the same topic.

Instructional Design (continued)

❏ I can offer an assignment where students are asked to create and share one new resource relevant to a key topic learned in the course: for example, a journal article, a video, a podcast series, a web page, or a social media group.
❏ Periodically, I offer opportunities to refresh previously taught or experiential material and knowledge. Wherever possible, I suggest how new competencies can be practiced.
❏ I've included at least one assignment where students work to develop their own review tools (for example, using a wiki or Google Docs), improving their metacognition (or awareness of how they learn).

Our Academic Community

❏ I have links on my course to help my students, especially those who are distance students, participate in our academic community. These resources may have been created by my school's instructional designer, as a resources page, or as part of a LMS course, making them easy to add. For instance, one OCTBR resources course includes the school's Honor Code, academic success resources like "Seven Habits of Highly Effective College Students", links to the Student Ombudsman, Testing Center, Office of Student Affairs, Parking Services, a campus map and a summary of FERPA and HIPAA. All can be easily copied into a course.
❏ I also have a link to the bookstore, a list of required books, test-taking tips, a link to the school's Academic Survival Guide, information about accessible study rooms and locations, and a link to our department, and advising.
❏ I have information on background checks and annual required training, and the bulletin for my school.
❏ I have links for Student Life, Student Government, and Student Organizations.
❏ There is also a link to my program or department newsletter, as well as the graduation checklist for my program.

Additional Academic Resources

❏ I have a link to GradResources.org, which provides many resources for students in graduate programs.
❏ I have shared relevant links from Purdue University's OWL (Online Writing Lab), to help my students' writing and research skills.
❏ I link to other third party documents that help students organize time, energy and succeed in school.
❏ I include other study resources tailored for the class, field of study, and program.

Resources for Student Health

❏ To support wellness, I also have links to the main Student Health page, the Mental Health Crisis line, a link to suicide prevention information, information regarding Veterans, and a link to an alcohol and substance abuse awareness page.

Information Literacy

Library Skills and Resources

❏ If my learning management system (such as Blackboard) does not already include library links, my school's library website is linked into my course's main menu. I also have a content folder or section focusing on library tools and research. This includes a library guide for my relevant school or program, literature and database search instructions ("How to search CINAHL"), etc.

❏ To assist distance learners, there are links or PDFs about off-campus library use.

❏ All my library resource links – articles, ebooks, projects, etc. – have been coded with any needed proxy prefix, so students can access the materials off-campus. Or – I explain how students login remotely to the library to access materials from off-campus.

❏ I created media (video or audio files) describing the process of using library resources, or how to complete a search. I also link in the most relevant media created by the library.

❏ I requested that a librarian join one of our online office hours to share information about library materials and access.

❏ One or more of my assignments assess how well students are learning the use of library resources: for instance, I may require multiple databases be used for the same assignment.

Evidence Based Practice

❏ My course can feature an assignment in which students can use four or all "S" elements from Haynes' 5S model. Melnyk's Hierarchy of Evidence model can also be used to practice critical analysis of evidence. Trisha Greenhalgh's *BMJ* articles on critically assessing papers can be linked as references, or analyzed by students in an assignment.

❏ An assignment requiring a student to develop a critically appraised topic (CAT) can be included in an advanced course. These CATs can be shared privately within the online course, or over social media, blogs or relevant sites.

❏ Some students may not have been taught EBP yet in the sequence of their program: if this is the case, I can still "scaffold" later, formal learning of EBP. For example, my course can feature links to a variety of elements (different resources, types of evidence) featured on Melynk's Pyramid and Hayne's 5S model, so that students become more familiar with these resources and accessing them in an online course.

Social Media

❏ I've shared the school's social media policies as a link in the course.

❏ I've included a statement that reminds students that when they use social media, they can't share anything that is covered under FERPA and HIPAA law, and a quick primer of questions for students to ask themselves before sharing any aspect of their clinical experiences to the web.

❏ I've also created an opportunity to assess the learners (such as a test or a short journal entry) on their understanding of HIPAA, FERPA and social media.

❏ An assessment or discussion, (utilizing a media format like Voicethread, or the creation of simple media by students), can provide a chance for course learners to reflect on social media and professionalism.

Social Media (continued)

❏ Learners have another opportunity to consider social media use, for example sharing (within FERPA and HIPAA controls) cases or learning. This activity might involve, for instance, creating #FOAMED posts on an unusual medical case, or occupational therapy CATs shared on a blog or Facebook group. With this activity, learners can reflect on the experience of getting crowd-sourced feedback.

❏ I've checked any third-party podcasts, blogs or social media sites I plan to use for content issues and conflict of interest, using the [Quality Checklists for Health Professions Blogs and Podcasts](#) (Colmers et al, 2015) or a similar tool.

❏ To help learners gain critical-thinking and media assessment skills, if my course features crowd-sourced information (such as posts tagged with #FOAMED), I selected sources that incorporate peer review and discussion (such as the ALiEM blog and its MEDIC series). Or, I pair it with peer-reviewed information on the same topic (such as a journal article, Cochrane review, etc).

❏ An activity, discussion or assessment gives learners a chance to further reflect on how they can critically consider open access resources, such as MOOCs from other schools, or #FOAMED resources, and how they might develop open access resources for learners and clinicians in their field. This can be extended to an actual process. For example, third year students can create a series of wiki articles, or podcasts to help first year students in their field.

Copyright, Fair Use and Creative Commons

❏ I've confirmed that all materials and resources in my course cite their original source, from texts to websites, to multimedia. I've added direct links for web-based materials.

❏ I have a short definition that explains the difference between public domain material, Creative Commons materials, and fair use of copyrighted material, and have extensive links that are relevant to my field specifically, as well as the health sciences in general. For example, the definition I include about Creative Commons-licensing is followed by a relevant *PLOS-One* paper for my field, licensed under Creative Commons.

❏ I also include a statement explaining to learners that using public domain, or Creative Commons-licensed, text or media, is still considered academic plagiarism if placed in their work without proper citations.

❏ I can add an assignment, discussion or other activity where students can use or create Creative Commons-licensed, and/or public domain materials.

❏ I've also added a discussion, or other activity to help learners reflect on their understanding of intellectual property rules in my field – including its relevance to plagiarism.

Plagiarism

❏ I've included a definition of plagiarism, and the school policy on plagiarism.

❏ Additional relevant plagiarism resources from my campus are provided, and I've included outside resources that give some more context to plagiarism in my field and the world as a whole.

❏ I've included a sample work: one version of the work shows plagiarism (such as omitting in-text citations), while the other version shows corrections (such as linked references and in-text citations).

Professionalism and Community Practice

Community Creation & Group Relations

- ❏ I offer an icebreaker or similar exercise for distance learners, encouraging introductions and questions on the course discussion board.
- ❏ Discussion topics are open-ended, reflective and avoid "I agree/me too" responses.
- ❏ A rubric defines participation standards in the class, and how I would like peers in the course to interact with one another.
- ❏ There are two or more group projects or assessments, including an opportunity to create a media object (e.g. crowdsourced video or audio podcast) using tools like email, Google Docs or conferencing software to communicate and/or develop, sharing the final media product in the course.
- ❏ Peer critiques for group work is matched to a rubric that includes participation expectations and objectives. Peer scores can be submitted anonymously; to make it easier to grade their cohort, learners' lowest peer score can be dropped in any final, summative, grade.

IPE

- ❏ I've created a roleplaying group exercise or discussion, so learners can practice resolving a scenario from different professional backgrounds.
- ❏ A reflective group discussion or assignment (such as a response to a video about "delivering bad news" or "patient education") can help learners to consider responses from a different professional perspective.
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Community of Practice

- ❏ I've introduced a definition of "communities of practice" in the course, how these communities exist in learners' fields of interest, and how they are created and maintained in hybrid and distance learning scenarios. I may provide examples of online communities where professionals share their knowledge in a networked community of practice.
- ❏ There's either an assessment or a discussion presented in the class where learners introduce each other to existing communities of practice, and discuss how to define these both online and offline communities.

Student Self-Reflection and Metacognition

- ❏ A self-assessment helps students and other learners consider how prepared they are to learn online.
- ❏ Learners are also given an assignment, group project or discussion that allows them to describe and design their own learning goals, and an individual and/or group plan for achieving their goals. The identification of any transition from didactic/feedback-rich learning to learner-defined goals in clinical rotation is part of the assignment or discussion.
- ❏ There is an assignment where students can discuss cases online with one another, as well as general concepts and trends that tie cases together.
- ❏ I have specific reflective questions in mind that I will be asking learners in response to their posts on discussion boards, blogs, and journals in the course.
- ❏ I've developed assignments to spur more "reflection on action", with many tools in the course (notes, journals, wikis, assessments, learner-created questions and objectives) to help learner reflection.

Student Self-Reflection and Metacognition (continued)

❏ I can adapt Pangaro's RIME assessment (1999) as a tool for student self-reflection and metacognition; for instance, clinical learners can use journal questions that explore the RIME roles, or could self-assess their data collection during clinical rotations.

❏ I am either using an existing clinical skill checklist or inventory (such as the Clinical Skills Inventory by Alguire et al., 2008) or have created my own inventory to help learners become more aware of their learning goals and the competencies they need to reach.

❏ Media shared within the course can have a reflective purpose, such as learners blogging comments that reflect on a podcast created by an ePatient, including their theoretical responses as clinicians.

❏ I can ask students to reflect on the "muddiest points" of the course, and overall on what they're learning.

❏ While emphasizing HIPAA and FERPA concerns, I can design an assignment that practices narrative ethnography (as described in Quirk, 2006). For instance, a private Voicethread could be a place to share a story about clinical experiences.

HIPAA and FERPA

• There are links to [HHS.gov's](HHS.gov's) Health Information Privacy website, HIPAA website, and the FERPA summary provided by the Department of Education.

Professionalism

❏ I have a link to my school's professionalism page, the fraud and abuse hotline, and pages regarding bullying, harassment and disrespectful behavior.

Assessments

General Assessments

❏ I have a template, and a rubric, for the most challenging assignment in my course(s).

❏ I can provide a sketched-out sample document to help with a challenging assignment.

❏ With a competency students are working towards, I also give them opportunities to get formative feedback, and clearly differentiate this feedback from regular evaluations.

❏ If I have less time to provide feedback for tests and quizzes, I can provide it to the group, giving a chance for corrections and practice.

❏ I can adapt the one minute paper format as a qualitative "pop quiz". This can help measure where students' current knowledge is, before starting a new challenge in the course.

❏ I can select best practices for my assessments by looking at the ACGME 2000 Toolbox of Assessment Methods, and a follow-up Joint Initiative study that rated the best methods for assessments.

Group Work

❏ Where group work is expected, I've also provided learners with a group rubric (for example, Griffin and Novotny's Interpersonal Skills Rubric), specifying not only how the assignment should be completed, but expectations for roles in the group, if necessary.

❏ The actions of team members as part of a group can also be assessed using a tool like the Eberly Center's Peer Evaluation Form for Group Work. Students can receive scaffolding that relates to this or similar tools, provided prior to the assessment, group project or experience.

Assessments (continued)

Role Play
- ❏ Using Groups on Blackboard (or another learning management system), or an online discussion board, learners can be assigned exercise roles that alternate between patient/client, or members of a team working together.
- ❏ A team can also run through a more formal modeling exercise (such as the POSE model in Quirk, 2006).

Portfolios
- ❏ Portfolio assessments have been designed as either a summative or formative tool, and can use a model format outlined by Webb (2002): a cake mix design or spinal column model are both solid formats for health science education.
- ❏ In addition to designing the template students will use in their portfolio, I offer guidelines for the materials they'll share in the portfolio, and grading criteria.
- ❏ My grading criteria can feature compensatory or conjunctive scoring, use a global or analytic rubric, or feature either or both qualitative or quantitative measurement.
- ❏ I can use the REFLECT Rubric or similar tools to help students with a formative learning portfolio for self-reflection.
- ❏ If my portfolio starts formative, and becomes summative, I can structure different uses for the portfolio in the design.
- ❏ Where appropriate, my assignments in the course can flow directly into pre-defined portfolio sections.
- ❏ If I wish, I can design a portfolio that can be used easily on a mobile device; using knowledge from didactic classes, and problem cases, collected materials can have a second life as a "toolkit," used as a clinical reference for reflecting in action. This toolkit can be downloaded from Blackboard Portfolios or a similar tool in HTML format, then used on learner phones, and mobile devices.
- ❏ I have also implemented, in courses where clinical experiences can prompt stressful, difficult feelings or memories, as described by Buckley, Coleman and Khan (2010), a method of protecting the privacy of portfolio users, and resources to help them work through any reflections that are particularly difficult.
- ❏ I can design a portfolio to match a structured list of competencies, such as the elements on AAMC's Clinical Skills Curriculum, ACGME competencies or milestones. There are clear expectations to meet the competencies through portfolio assessments.
- ❏ Another alternative use for portfolios can include the illness scripts concept (Schmidt et al., 1990) as a means for repurposing other assignments or experiences. Students can turn new items into an illness script, to serve as a reference for clinical rotation.

Technology Literacy

Tech Literacy
- ❏ I define any necessary technology my learners will need to use in the course, along with any resources that will help learners pick up the new skill rapidly.

Multimedia
- ❏ My videos and animations use multimedia learning principles. For instance, instead of creating one long video, I chunk my videos so they have shorter running times.

Multimedia (continued)

- ❏ My videos and animations can feature narration, but don't have a lot of visual text on the screen. For accessibility reasons, I do have a transcript or captions available for turning on or off, but having titles that fill up the screen in my videos breaks best practices based on cognitive load theory ([Mayer and Moreno, 2003](#)). My learners will find it more difficult to remember text if it's both posted on the screen and spoken aloud; it's best that it just be narrated with animations, motion, or images only.

Tech Support

- ❏ I have also listed the email, telephone number and websites for technical support.
- ❏ Wherever there are user support pages produced by vendors (Blackboard, Canvas, Voicethread, Tegrity, etc.) I have linked these for student users.